

**Chubb & Son  
Administration**

# Memo

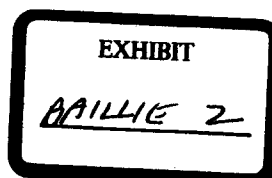
**To:** Doug Baillie  
**From:** Tim Ezerlong  
**Date:** 05/08/01  
**Re:** Visit of May 2<sup>nd</sup> - Recap & Follow-Up

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I want to recap several items of discussion from my recent visit.

1. **Scorecard** – I believe we agreed on appropriate amendments to your scorecard. Please edit per our discussion and forward to my attention at your convenience.
2. **Priorities** – Attached is a short list of developmental priorities - progress, against these is key to your success. In addition to reviewing scorecard components, we will review these in measuring your progress through the year.
3. **Regional Roles** – We again discussed your role and the appropriate direction to your team that have Regional responsibilities. As there continues to be some confusion on this, I have attached a brief memo further describing these responsibilities, which you may find useful to ensure clarity going forward.
4. **Production Offices** -
  - **Louisville** – I am very concerned about the lack of sales coordination in this office. They appear a bit rudderless, which calls into question Andy Bryant's ability to provide necessary leadership. We must more clearly define the expectations for Andy Bryant and also for Jeff Barton in managing marketing efforts in this branch. I would appreciate a copy of the goals/direction you provide them when prepared.
  - **Columbus** – I am very disappointed in Tom's impression from his recent visit. I have seen more evidence from Jeff Barton in coordinating the sales efforts here, but he must more aggressively drive the process yet. Again, I'd like to see a copy of your direction to Barton on his role in managing this effort as soon as available.
5. **Sales Focus** – We discussed a plan to move some renewal handling out of the production offices and/or reallocate the work. This will move some positions to primarily a new business development role. The bottom line goal is to move our production offices to primarily sales offices. I'd like to see your plan for each of these offices within the next few weeks.
6. **Jeff Barton** - As mentioned above, I want to see Barton's role more clearly defined as it relates to driving sales in the production offices. Additionally, Jeff needs to drive issues harder and demand more – an approach in which he is clearly reluctant. Let's make sure his overall goals for the Region focus on specific business results he must achieve through others, and not just managing the process behind it.

I look forward to our further discussions on these items.



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**To:** Doug Baillie  
**From:** Tim Szerlong  
**Date:** 05/08/01  
**Re:** **Development/Performance Priorities**

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1. Achieve turn around in profit results in Cincinnati.
2. Effectively direct and engage regional resources. Provide a clear sense of direction in clarity of role. Achieve consistent support for driving business objectives through the Regional territory. (Effectively adopt the revised Regional role).
3. Effectively manage a shift in production offices, which will improve sales execution and more effectively allocate renewal management. Devise and implement a plan, orchestrate change, and revise goals and position descriptions to move to a predominant sales focus in each office.
4. Increase your internal management engagement. Instill a clear vision, and ensure the appropriate performance standards are "upheld". Raise the bar consistently in measuring performance. More deeply engage with each lieutenant in providing guidance, coaching, and performance feedback.
5. Shape how you are perceived as a leader through better staging your interface and communication at all levels within the organization. Elevate your presentation and dialogue with your staff (downward), and better balance your position and communication in collaboration through the organization. Garner confidence and support from various constituents within Chubb.

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